

22nd Annual

Banking & Finance Symposium

THE UNIVERSITY OF MISSISSIPPI



FRIDAY, OCTOBER 27, 2023
Oxford Conference Center
102 Ed Perry Blvd., Oxford MS 38655



School of Business Administration
Banking and Finance

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PROGRAM

For over 100 years, the University of Mississippi School of Business has been educating business leaders. For over 20 years, we have held a Banking and Finance Symposium to educate our students, alumni, and finance professionals on current topics that impact the industry. The symposium is hosted by Dr. Ken Cyree and emceed by Mr. Stan Viner.

7:30 - 10:00 am	Check-in; Breakfast available until 9:30 a.m.	<i>Lobby</i>
8-9:30	Women in Finance Breakfast	<i>Oak & Cedar</i>
	Welcome and Introductions Tara Plimpton, <i>Senior Executive Vice President, Regions Bank</i> Liz Jacobs, <i>Head of Regional Banks, Managing Director, Morgan Stanley</i> Grant Gregory, <i>Managing Director, Morgan Stanley</i>	
10:00	Keynote Speakers Mike Bianco, <i>Head Coach, Ole Miss Baseball Team</i> Daniel Brown, <i>Senior Director, Economist, ABA</i> “Fireside Chat” with Grant Gregory and Liz Jacobs Moderated by Charles White, <i>Managing Director, Fixed Income Capital Markets, Stifel</i>	<i>Oak & Cedar</i>
Noon	Lunch & Award Presentations	<i>Oak & Cedar</i>
1-3:00 pm	Concurrent Sessions: you choose which ones to attend	
1:00	Trends in Fintech Moderator: Charles Potts , <i>EVP and CIO, ICBA</i> Panelists: Wade Barnes , <i>Financial Services Industry Lead, Hartman Advisors</i> Joshua Jordan , <i>Sr. Strategist, Jack Henry</i> Greg Ohlendorf , <i>President and CEO, First Community Bank & Trust</i>	Auditorium
OR	What’s Next in M&A Moderator: Paul Davis , <i>Director of Market Intelligence, SRM</i> Panelists: Edward Francis , <i>Chairman, CEO, and President, InBank</i> Andy Marshall , <i>CEO, President, and Director, FirstBank Southwest</i> Christopher Mihok , <i>Managing Director, Keefe, Bruyette & Woods</i>	Oak & Cedar
2:00	Leveraging Digital Assets/Blockchain and AI Moderator: Scott Mills , <i>President, William Mills Agency</i> Panelists: Richard Levin , <i>Chair, Fintech & Regulation Practice, Nelson Mullins</i> Wade Peery , <i>Chief Innovations Officer, FirstBank</i> Larry Pruss , <i>Managing Director, SRM</i>	Auditorium
OR	Strategic Talent Planning Moderator: Jimmy Sawyers , <i>Chairman & Co-Founder, Sawyers & Jacobs LLC</i> Panelists: Eric Adkins , <i>Senior Vice President, Human Resources, PriorityOne Bank</i> Marcus Mallory , <i>Executive Vice President and Chief Banking Officer, BankFirst</i> Sean O’Neal , <i>Partner, Financial Svcs./Real Estate, Chartwell Partners</i>	Oak & Cedar
3:00	Reception - Beverages and light hors d’oeuvres	Lobby

2023 NAMED SPONSORSHIPS

Adams & Reese LLP

Board Dinner

Cadence Bank

35 & Under Scholarship
& Strategic Talent
Planning Panel

Chartwell Partners

What's Next in M&A Panel

Community Bank

Lunch

ICBA

Board Dinner

Keefe, Bruyette, and Woods
(KBW)

Closing Reception

mTrade

Trends in Fintech Panel

Regions

Women in Finance Breakfast

Sawyers & Jacobs

Board Cocktail Hour

Strategic Resource
Management - Memphis

Morning Break
& Student Intern

STIFEL

Closing Reception

White Clay

Digital AI Panel

SPEAKERS



ERIC ADKINS

Eric Adkins is the Senior Vice President of Human Resources at PriorityOne Bank in Magee, Mississippi. He has been with PriorityOne Bank since 2012 and has extensive experience in human resources, spanning over a 27-year career. His expertise covers a wide range of HR areas, including employee and labor relations, benefits and compensation management, human resources technology systems, talent acquisition, training, payroll management, safety, and performance management. Eric has worked in various industries throughout his career, including technology, manufacturing, foodservice, and banking.

Eric has overseen the design and implementation of executive compensation packages, aligning executive pay with organizational performance and objectives. Moreover, Eric has been responsible for managing overall salary and compensation structures across organizations, ensuring competitiveness and equity in compensation practices.

In addition to his professional role, Eric is an active member of the Mississippi Bankers Association, indicating his involvement in the banking industry at a broader level. Eric teaches Human Resources to first year students at The Mississippi School of Banking. He is also committed to his community and has served in various leadership roles with numerous community and civic organizations, reflecting his dedication to community engagement and service.

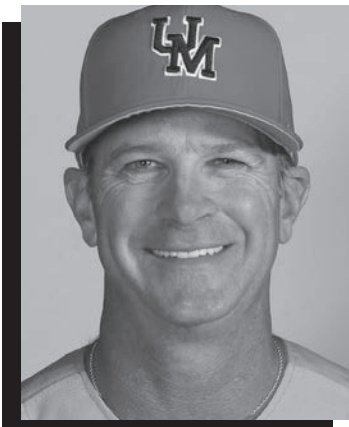
Eric Adkins earned his Bachelor of Arts degree from Mississippi College.



WADE BARNES

Wade has spent the majority of his career in banking, starting as a teller and advancing through the ranks to the C-suite. His background makes him an indispensable resource to clients in the banking and financial services industry, who benefit from his extensive knowledge of regulations and current trends. Wade believes that the right use of technology can be a key marketplace differentiator for financial services companies, from both a customer service perspective and a business process and operational efficiency perspective.

Most recently, Wade was the chief marketing officer at Howard Bank. In this role, he championed the importance of using technology to source new clients and expand relationships with existing clients by defining the customer journey and personalizing the banking experience. He also created and led a corporate discipline for product development, including a FinTech initiative, with a focus on processes for highly efficient internal operations and enhancements to the customer experience. Wade also held director-level roles in retail banking, marketing and e-commerce at 1st Mariner Bank, where he leveraged technology to automate business processes and used data analytics to drive marketing strategy and automation. Wade most enjoys spending time at home with his wife and daughter, especially when he has time to try out a new recipe for dinner. You might also find him on the golf course, at a board meeting, or making plans for his next European vacation.



MIKE BIANCO

Mike Bianco is entering his 24th season as the head coach of the Ole Miss baseball team, making him longest-active coach in the SEC among the sports of baseball, men's basketball, and football. In 2022, Bianco led the Rebels to their first National Championship in program history, making an unprecedented run as the last team into the postseason.

With a record of 879-514-1 in Oxford, Bianco is the second-winningest coach in SEC history and the winningest in Ole Miss history. Bianco has led Ole Miss to 18 postseason appearances in 22 full seasons, including eight Super Regional berths and two trips to the College World Series (2014 & 2022).

Named the National Coach of the Year in 2022 & 2020, Bianco has led the Rebels to four SEC Western Division titles, two SEC Tournament titles and one SEC regular-season championship. Ole Miss has seen 130 players drafted into Major League Baseball during his tenure, including a combined 24 in the past five seasons, and 23 Rebels have made their MLB debuts in the past 21 seasons. Bianco has coached a total of 93 All-America and Freshman All-America selections.

Bianco, 55, was born May 3, 1967, and is a native of Seminole, Florida. He is married to the former Camille Marquette, and the couple has five children: sons, Michael, Benjamin, Andrew and Samuel, and one daughter, Catherine.

Bianco Career Highlights

- 2022 National Champions
- 24th Season at Ole Miss: Longest-tenured coach in baseball, football, or men's basketball in the SEC.
- 2022 & 2020 National Coach of the Year
- All-time wins leader at Ole Miss
- 2nd all-time winningest coach in SEC history
- Winningest active coach in the SEC
- 18 postseason berths in 22 full seasons
- 130 Rebels selected in MLB Draft in 23 seasons
- Coached 23 future MLB Rebels in 21 seasons
- Two SEC Tournament titles, one SEC Regular Season title, four SEC Western Division titles





DANIEL BROWN

Daniel Brown is a Senior Director-Economist for American Bankers Association (ABA) where he is a key contributor to the ABA's economic research agenda. Published research while at the ABA includes work examining the ramifications of Consumer Financial Protection Bureau (CFPB) rulemaking on small business lending, the role of the Federal Home Loan Banks (FHLBs) after the failures of Silicon Valley Bank and Signature Bank, and research on commercial real estate lending. Daniel frequently presents to key banking groups, such as executives from the state banking associations, ABA's Commercial Real Estate Committee, and the ABA's Economic Advisory Committee, which is comprised of chief economists from our nation's largest banks. Prior to joining the ABA in 2022, Daniel was most recently a Regulatory Economist with the U.S. Small Business Administration Office of Advocacy, and he also worked on Capitol Hill at the House Committee on Small Business. Outside of work, Daniel is an active member of the National Association for Business Economics (NABE), where he completed their Certified Business Economist program and is currently co-chair of NABE's small business chapter. Daniel is also currently enrolled in the Stonier Graduate School of Banking which is taught at the Penn Wharton School of Business. He received his Master of Arts in applied economics from The George Washington University, and his Bachelor of Arts in economics from the University of Notre Dame.



DR. KEN B. CYREE

Dr. Ken B. Cyree is Dean, the Frank R. Day/Mississippi Bankers Association Chair of Banking, and Professor of Finance at the University of Mississippi School of Business Administration. Dr. Cyree received his doctorate and MBA from the University of Tennessee. He is the Director of the Mississippi School of Banking and a former faculty member at the Graduate School of Banking at LSU for over 20 years.

Dr. Cyree's research interests are in banking, financial markets, interest rates, and regulation. He has papers published in the Journal of Business, Journal of Banking and Finance, Financial Management, Journal of Financial Research, the Journal of Financial Services Research, the Journal of Financial Markets, and Financial Review, and Public Choice along with many other academic journals. He was Vice President for the Program and is Past-President of the Southern Finance Association. He has also served on the nominating committee for the Eastern Finance Association. In addition, Cyree was on the Editorial Board of the Journal of Business Research and was an Associate Editor at the Journal of Financial Research. He was awarded the Outstanding Teacher of the Year in 2007 and Outstanding Senior Researcher in 2014 for the University of Mississippi School of Business Administration.

Cyree has had numerous media interviews including National Public Radio (NPR), Mississippi Public Broadcasting, ViewPoint television, The Marshall Ramsey Radio Show, The JT Show, Good Things with Rebecca Turner, and Sportstalk with Richard Cross. He has also been on the Paul Gallo Show on Sportstalk Mississippi. In addition, he has been quoted in the Clarion Ledger, Hattiesburg American, Mississippi Business Journal, the Tupelo Daily Journal,

DR. KEN B. CYREE CONT.

among other newspapers and online news sites such as Bloomberg, LendingTree.com, and Fox Business. Cyree has also spoken to the Conference of Bank State Supervisors, the St. Louis Federal Reserve, the Mississippi Bankers Association, and testified before the Mississippi State Legislature Banking Committee. He is a Board member of the Mississippi Young Bankers Association.

As Dean, Dr. Cyree has focused the strategic direction for the school on high-quality scholarship, as evidenced by publishing in highly-ranked journals, as well as high-quality, relevant, and rigorous teaching. Through the hard work of the faculty and staff, the School of Business has been in the top 100, and the online MBA program ranked in the top 20 overall by US News for the last few years.

Dr. Cyree and his wife Lori reside in Oxford, and they have an adult son who lives in Carrboro, NC.



PAUL DAVIS

Paul Davis is Director of Market Intelligence at Strategic Resource Management, an advisory firm in Memphis. Paul has more than 20 years of experience covering the financial services industry. His background includes SNL Financial, where he was the news director and senior bank reporter, and American Banker, where he spent 11 years as editor of community banking and M&A. He has a bachelor's degree from the University of Virginia and an MBA from Wake Forest University. Paul formed American Banker's CEO advisory board and developed a comprehensive social media platform for the Wake Forest University Schools of Business. Paul has been featured as a speaker at the Federal Reserve, the American Bankers Association and FIS Global, and he has been regularly quoted by American Banker, S&P Global Market Intelligence, Bank Director, and NPR's Planet Money regarding industry trends. He is a contributor to the Forbes Finance Council and oversees Bank Slate (www.bank-slate.blogspot.com), a blog that focuses on the banking industry.



EDWARD G. FRANCIS SR.

Ed has 35 years of banking and financial institution experience and is Chief Executive Officer and Chairman of the Board for InBankshares and InBank. As the founder of InBankshares, Corp., he's held this position since the inception of the company in 2018. Previously, he held the position of Executive Vice President and Chief Banking Officer at Hancock Whitney and led both retail and commercial banking divisions. Ed also served on Hancock Whitney's Executive Management Committee for more than 10 years as assets grew from \$5 billion to over \$25 billion. He holds a B.S. in Managerial Finance from the University of Mississippi and matriculated from the Graduate School of Banking at LSU. Ed also serves on the board for Firefly Autism in Denver, the Ole Miss Banking and Finance Symposium and the Ole Miss Business School Advisory Board.

GRANT GREGORY

Grant is a Managing Director and Head of North America Banks & Diversified Finance Group. The vast majority of Grant's career has been focused on advising financial institutions on strategy, acquisitions, divestitures, balance sheet construction and capital management.

Prior to his current role, Grant was Head of the North American Bank Group from 2011-2016. Grant started his career as an Analyst in Morgan Stanley's M&A Group.

Grant graduated with distinction from Dartmouth College and the Harvard Business School. He and his wife Kim have three children and live in Connecticut and Minnesota.

His advisory experience includes: MUFG's debt for equity exchange with U.S. Bancorp (\$1Bn); Truist's 20% sale of Insurance Holdings to Stone Point (\$2Bn); First Horizon's sale to Toronto Dominion (\$13.4Bn) terminated; Bank of Montreal's acquisition of Bank of the West (\$16.3Bn); MUFG's sale of Union Bank to U.S. Bancorp (\$11.5Bn); United Community's acquisition of Reliant Bank; People's United's sale of Insurance Brokerage to Assured; United Community's acquisition of Three Shores; Regions' acquisition of Ascentium from Warburg; First Horizon acquisition of Iberia (\$3.9Bn) and BB&T branches; Hancock's acquisition of MidSouth; Hancock's acquisition of Capital One Trust; Synchrony's; acquisitions of Paypal Credit (\$7.6Bn); GreenSky's Initial Public Offering; Regions Financial's sale of Insurance Brokerage to BB&T; United Community's acquisition of Navitas; First Horizon's acquisition of Capital Bank (\$2.2Bn); Hancock's acquisition of First NBC; United Community acquisition of Palmetto Bank; KeyCorp divestiture of Victory Capital to Corsair; Hancock's acquisition of Whitney (\$3.1Bn) South Financial's sale to Toronto Dominion; BBVA's acquisitions of Compass (\$9.6Bn), Texas Regional (\$2.2Bn), and State National; Union Planters' merger with Regions Financial (\$5.9Bn); GFC Capital Raises: Suntrust, Fifth Third, KeyCorp, First Horizon, Commerce, BancorpSouth, and Texas Capital.

Grant's selective Book run Capital Raises include: BOK Financial, Cadence, Comerica, Cullen Frost, EverBank, First Republic, Merchants, SoFi, Synchrony, Synovus, Private Bancorp, SunTrust, TCF Financial, Texas Capital, and Zions.

LIZ JACOBS

Liz is a Managing Director in the Financial Institutions Group at Morgan Stanley. She is Head of Regional Bank Coverage. Prior to joining Morgan Stanley in 2018, Liz was a Managing Director in the Financial Institutions group at Barclays.

Her experience includes the following transactions: New York Community's FDIC assisted acquisition of Signature Bank; Texas Capital on the sale of its premium finance business to Truist; Flagstar's merger with New York Community; Sale of Boston Private to Silicon Valley Bank; Citizens Financial Group on its acquisition of Investors Bank; Valley National Bank on its acquisition of Leumi Bank and lead bookrunner on its inaugural sustainability bond; Synovus on its acquisition of GlobalOne; State Bank on its acquisition of Alostara; Trustmark on its acquisition of Banctrust and Bay Cities; Encore Bancshares on its sale to Cadence; Comerica on its acquisition of Sterling; State Street on its acquisition of Investors Financial; Wachovia on its sale to Wells Fargo; Old Florida Bank on its sale to IBERIA; and, Sandler O'Neill on its minority stake sale to Kelso & Carlyle.

Liz earned a B.A in Political Science and Economics from Duke University.



JOSHUA JORDAN

As a Sr. Strategist with Jack Henry, Joshua is responsible for fostering partnerships and collaborations with fintechs and articulating the technical and strategic vision of Jack Henry Digital to community financial institutions and the fintech industry. Joshua has been with Jack Henry since 2015 and has more than 20 years of community and digital banking experience. Joshua attended Doane University and resides in Lincoln, Nebraska with his wife and five sons. When he is away from the office, Joshua is an active musician, avid golfer and amateur luthier who loves spending time with his family.



RICHARD B. LEVIN

Richard B. Levin is chair of the FinTech and Regulation Practice of Nelson Mullins Riley & Scarborough LLP and one of the first lawyers to focus on the regulation of blockchain and digital assets. He is considered a thought leader in the FinTech space. Richard brings his experience as a senior legal and compliance officer on Wall Street and in London to bear in advising clients on corporate, FinTech, securities, and regulatory issues. He has been advising FinTech clients on legal and regulatory issues since the start of electronic trading in the late 1990s. His practice focuses on helping financial services and technology clients identify and address regulatory issues as they build their businesses.

Richard's practice focuses on the representation of early stage and publicly traded companies in the FinTech space, including investment banks, broker-dealers, investment advisers, peer-to-peer lending platforms, digital currency trading platforms, ATSS, exchanges, and custodians. He represents these firms before the SEC, the CFTC, FINRA, the U.S. Department of the Treasury, the OCC, state regulators, and Congress. Richard has represented clients before regulators in Australia, Canada, France, Germany, Hong Kong, Ireland, Japan, Singapore, South Korea, and the United Kingdom.

Richard has been identified by Chambers and Partners as one of the leading lawyers in the Blockchain and Cryptocurrencies category for six years since the inception of the category. He has been recognized by Chambers for his knowledge on securities regulatory matters, great relationships with regulators, for helping clients push the boundaries of the FinTech sector, and for his advice on matters such as broker-dealer licensing and alternative trading systems.

Richard is routinely quoted by leading publications including Bloomberg, the New York Times, Reuters, and the Wall Street Journal and is a frequent speaker at conferences around the world on the regulation of FinTech, blockchain, and digital assets.





MARCUS MALLORY

Marcus Mallory, Executive Vice President and Chief Banking Officer at BankFirst, has been in the financial field since 1989. His banking career has included loan review, loan and deposit production, credit and branch administration and his current role as Chief Banking Officer.

Marcus holds a banking and finance degree from Mississippi State University and is a graduate of the Graduate School of Banking at Louisiana State University.

He currently serves as a board member of the Business and Industry Political Education Committee (BIPEC) as well as the MS Catholic Foundation. He is a past chairman of the Mississippi State University Finance and Economics Advisory Board and past board member of the MS Bankers' Association. A Leadership Mississippi alumnus, Marcus and his wife Katherine (a faithful Ole Miss alum!) reside in Columbus and are members of Annunciation Catholic Church and have recently become proud grandparents to Hal Thomas Mallory.



ANDY MARSHALL

Andy Marshall is the CEO, President, and Director of FirstBank Southwest in Amarillo, Texas; a \$1.7B community bank serving the Texas and Oklahoma Panhandles, DFW Metroplex, and Austin and San Antonio metro regions. Originally from Tupelo, Mississippi, Marshall's active in banking industry groups and activities across a multi-state region. He's a board member of the Texas Bankers Association, the chairman of its Government Relations Council, and a panelist on the TBA CEO/Executive Management Bi-Weekly Virtual Meetings. While being an on-going guest lecturer at the Texas Tech Rawls College of Business, he's a member of the Advisory Council of the TTU Excellence in Banking Program, a faculty member of the Graduate School of Banking of Colorado's Executive Development Institute, and a board member of The Bankers Bank, a correspondent bank in Oklahoma City. An active duty veteran of both the US Army and US Air Force, his banking career has been spent primarily in commercial management positions in regional banks in Mississippi, Arkansas, and Oklahoma prior to assuming his current role as a Texas community bank CEO in 2017. He and his wife Denise are now empty nesters, with son Sam a commercial banker in Mississippi and daughters Amy and Maggie stay-at-home moms in Alabama and Mississippi, respectively.





CHRISTOPHER MIHOK

Christopher (Chris) Mihok serves as Managing Director in the Depository Investment Banking Group for the New York based firm of Keefe, Bruyette & Woods, Inc. He joined KBW in 2010 in the Richmond, Virginia office and is now based in St. Louis, Missouri.

His professional experience and industry expertise is focused on mergers and acquisitions, public and private equity and debt capital raising and strategic advisory assignments for Southeastern financial institutions. He has advised on more than 100 M&A transactions and capital offerings with an aggregate transaction value in excess of \$17.5 billion.

He received the Emerging Leaders Award in 2021. The M&A Advisor chose Mr. Mihok in recognition of the outstanding achievement as a Dealmaker in M&A and Financing industry before the age of 40. Mr. Mihok is an adjunct professor at the Graduate School of Banking at Louisiana State University.

Mr. Mihok graduated from the University of Richmond with a B.S. in Business Administration with concentrations in Finance and Accounting.



SCOTT MILLS

Scott Mills is President of William Mills Agency. He is responsible for guiding the account teams, monitoring tactical activities as they relate to the strategic plan, day-to-day management of the agency and customer service. Since joining the agency in 1989, he has worked in both creative services and client relations. Scott is also the editor of Bankers As Buyers, an annual guide to technologies and spending trends in the financial services industry.

Prior to joining the agency, Scott worked in the entertainment industry for WEKS-FM, WEA (record distribution) and WKLS-FM. He earned a Bachelor of Science degree from Georgia State University. Currently, Scott is on the board of directors of Association for Financial Technology (AFT) and TAG Fintech. Scott is accredited in Public Relations through the Public Relations Society of America.



SEAN O'NEAL

Sean O'Neal is a Partner with Chartwell Partners based in the firm's Dallas office. Sean brings over ten years of experience in Executive Search, following his career foundation and education in Finance.

Sean is a member of Chartwell's Financial Services practice focused on senior-level assignments including Board, CEO, and cross-functional Senior Leadership Teams across banking, real estate, and the broader financial services ecosystem. His clients have ranged from Fortune 500 to entrepreneurial start-ups in publicly-traded, private equity owned, and privately held firms across North America as well as international assignments.

Prior to Chartwell Partners, Sean spent six years with Heidrick & Struggles in progressive roles across multiple industry and functional verticals. Prior to his work in executive search, Sean worked in public accounting. He graduated from the University of Mississippi (Ole Miss) with both Bachelor's and Master's degrees in Accounting.



GREG M. OHLENDORF

Greg M. Ohlendorf is President & CEO of First Community Bank and Trust in Beecher, IL. He has been with the bank, the only bank he has worked for, since 1985. Greg is responsible for the strategic direction of the bank and is actively involved in the “community bank enabling” fintech space. He has written several articles and spoken at numerous educational seminars on fintech and its importance to community banking and works closely with fintech entrepreneurs at the ICBA Thinktech Accelerator where he serves as a member of the selection committee. Greg is Vice-Chairman of ICBA’s Operations and Payments Committee, Chairman of ICBA’s Digital Assets Task Force, and as a member of CBAI’s Innovations Committee. Greg has testified in front of Congress or the Federal Reserve on four occasions on a number of banking topics.

When not working, Greg is an avid golfer, having completed playing the 2005-2013 Golf Magazine World Top 100 course lists, the 2010 Golfweek Magazine US Top 100 Modern and Top 100 Classic course lists, at least one course in all 50 states, and over 1,000 courses in total. He has just published a book entitled “Global Golf Travels” chronicling his adventures. Greg is a graduate of Illinois Wesleyan University, Bloomington, IL with a BS in Business Administration and holds an MBA from Governors State University, University Park, IL. He is married to his wife, Melissa, and has one son, Cameron, who is the Senior Vice-President – Finance at his bank.



WADE PEERY

Wade Peery joined FirstBank in 2012 and currently serves as the company’s Chief Innovations Officer.

A career banker turned innovator, Peery leverages his 30+ years of banking experience providing thought leadership and shaping new ideas for the future of the company and the industry. A firm believer in imagining what is possible, he has become recognized as one of Tennessee’s leading financial services and digital asset innovators. In his previous role at FirstBank he served as the bank’s Chief Administrative Officer.

In 2022, Peery has shared his deep knowledge of digital assets through interviews with CoinDesk Live TV, The Tennessee Banker Magazine, and The Financial Brand. He has also presented at industry leading conferences, including Fintech Nexus Conference, Tennessee Bankers Annual Conference, Stephens Digital Asset Conference, Jack Henry Strategic Initiatives Conference, Mid-sized Community Bank Coalition Webinar, and Ole Miss Banking and Finance Symposium.

Peery brings meaningful insights and mentorship to other financial organizations. Currently he serves on the Board of Directors for the USDF Consortium and Zippy Loans, as well as multiple Jack Henry and Associates Advisory Boards including the Mid-Tier Advisory Board and the Digital Banking Advisory Board.

A Middle Tennessee State University graduate and former member of the football team, Peery serves as the Board Chair of Backfield in Motion, an organization that combines athletics and academics to inspire inner-city youth to reach their full potential. A lifetime Tennessean, originally from Hohenwald, Peery now resides in Williamson County with his wife Lisa and enjoys spending his free time fishing, hunting, and golfing.



TARA ANN PLIMPTON

Tara Ann Plimpton serves as Chief Legal Officer and Corporate Secretary for Regions Financial Corporation (NYSE:RF) and is a member of the company's Executive Leadership Team. She leads the company's Legal, Government Affairs, and Corporate Governance departments.

Plimpton joined Regions in 2020, following an 18-year career at General Electric. At GE, Plimpton most recently served as Vice President and General Counsel for GE Global Operations. In this role, she led a team of over 450 global professionals running critical compliance, trade, IP, labor, and transactional support for GE globally. Plimpton also served as General Counsel to several GE divisions, including Transportation and Energy. Prior to joining GE, Plimpton was the managing partner of a law firm and provided legal counsel to a variety of corporate clients in the manufacturing, agricultural, and tourism industries.

Regions, with \$154 billion in assets, is a member of the S&P 500 Index and one of the nation's largest full-service providers of consumer and commercial banking, wealth management and mortgage products and services. Plimpton received a bachelor's degree in International Relations from the University of Nevada and holds a Juris Doctor from Georgetown University. Plimpton was a board member of United Way (Atlanta) from 2012-2018, CARE's Women's Advisory Network (2017-2020), and Georgetown's Corporate Counsel Advisory Board from 2018-2022.

In 2022, Plimpton was recognized by Corporate Counsel's Women, Influence and Power in Law Award as a Diversity, Equity and Inclusion Champion. She was also recognized by the Birmingham Business Journal as a Leader in Diversity. She and her husband reside in Birmingham, Al with their two children.



CHARLES E. POTTS

Charles E. Potts is executive vice president and chief innovation officer for the Independent Community Bankers of America® (ICBA).

In this role Potts drives ICBA's innovation initiatives, and financial technology strategies, working with ICBA leadership to develop impactful, value-added solutions that help community banks seize new market opportunities to meet customers' evolving financial services' needs.

Potts' extensive experience in banking and financial service firms provided the background Potts needed to start, co-found or lead various fintech start-ups including digital banking, mobile engagement, financial management and payments providers. Many had successful exits via IPO's or acquisition via strategic acquirers.

A frequent speaker at national trade shows and conferences, Potts previously served as executive managing director at First Performance Global, where he led international business and corporate development activities for its card-control and fraud alert platform. Before that he served as CEO for NetClarity, a start-up in the University of Florida's Business Incubation Hub. Prior to ICBA, he worked at the Advanced Technology Development Center (ATDC), leading the fintech practice where he mentored startups as part of the Georgia Tech-based incubator.

Charles attended the Georgia Institute of Technology, did his graduate studies at Georgia State University in Atlanta and attended the Graduate School of Banking at LSU. Potts, an avid masters runner, cyclist and soccer fan, lives with his wife in Atlanta, GA. They have a daughter who recently graduated from the University of North Carolina at Chapel Hill where she was a nationally ranked pole vaulter on the Track and Field team.



LARRY PRUSS

Larry Pruss is Senior Vice President of Crypto Advisory Services at SRM (Strategic Resource Management), an independent firm that helps financial institutions identify cost savings and new revenue potential in their contractual relationships. An expert in the payments industry, Mr. Pruss' central role at SRM is as a cryptocurrency, card optimization, and revenue enhancement strategist for financial institutions in the USA and Canada. Mr. Pruss' background includes work with National Bank of Canada, where he served as Head of Cards, Payments, and Transactional Solutions. He previously served as Senior Managing Director of Credit Cards and Loan Revenue for Profit Insight, and as Senior Vice President of Portfolio Analytics for Bank of America.

Mr. Pruss offers significant expertise in cryptocurrency, analytics, consulting, leading payments, loyalty marketing, and portfolio acquisition.

With a proven track record of developing new products, increasing revenues, and improving operating efficiency, Mr. Pruss has helped numerous companies boost profitability by driving growth and negotiations.

Other clients with whom Mr. Pruss has worked with include Royal Bank of Canada, Banco Popular, Scotiabank, and MBNA.

Mr. Pruss holds degrees from Penn State University in Economics and Policy Analysis. He divides his time between Montreal and Pennsylvania, where he resides with his wife and children.



JIMMY SAWYERS

Jimmy Sawyers helps banks tackle issues ranging from strategic technology planning and system selection to cybersecurity and enterprise risk management.

A graduate of Christian Brothers University in Memphis, Tennessee, Jimmy started his career in financial services technology at a fast-growing bank, where he was chosen at the young age of 21 to lead the bank's operations and technology division, becoming one of the youngest officers in the history of the 100-year-old bank. Later, he directed the consulting division of a prominent CPA and consulting firm before joining a tech startup and then co-founding Sawyers & Jacobs LLC.

Jimmy is on the faculty of the Barret Graduate School of Banking at Christian Brothers University, the Southwestern Graduate School of Banking at Southern Methodist University, The Southeastern School of Banking at Belmont University, the Virginia Bankers School of Bank Management at the University of Virginia, and the Mississippi School of Banking at the University of Mississippi, where he teaches technology, payments, cybersecurity, and/or risk management courses at all five schools.

Jimmy has authored two books on technology and risk management in community banks, is a frequent contributor to industry publications, and is a regular on the banking industry speaking circuit.

Known as one of the most independent and informed voices in the industry, in addition to being nationally recognized for his entertaining presentations that engage, inform, and educate, Jimmy always delivers valuable takeaways, practical advice, and a fresh perspective on complex issues.



WANDA TAYLOR TRUXILLO

Wanda Taylor Truxillo has four decades of global corporate executive experience. She serves on the School of Business Banking & Finance Advisory Board and the Ole Miss Alumni Association Board of Directors. Truxillo enjoys being an active alumna of Tri-Delta, Women in Business, and a champion for the Business School Advisory Board Career Connect.

Truxillo, a native of Mississippi, graduated with a BBA in Finance & Marketing from Ole Miss School of Business. She earned graduate and post-graduate degrees in International Trade & Finance MITF (University of New Hampshire); Economics & Business Law MBA/JD (Southern Methodist University); and EMBA (Harvard Business School). Beginning her career with IBM, Truxillo held positions in sales and marketing management. As Senior Advisor, President's office, she teamed with IBM Global Financing on the formation of a Revenue Project aimed at maintaining high-profile clients. Truxillo became Director of Brand Launch for game-changing computer announcements and promoted the first certified partner distribution channel. The IBM product launch team was honored with the Malcolm Baldrige National Quality Award. After a distinguished IBM career, Truxillo was recruited by corporations focused on launching high-tech solutions across the globe. She spent four years on the Eastern Europe expansion team for the largest cloud-based mobile messaging provider.

Today, Truxillo manages her own firm focusing on consulting and mentoring executive talent for the fast-evolving financial industry. She and her children reside in Atlanta, Georgia. Truxillo serves on the Technology Association of Georgia (TAG) Leadership Council and WellStar Fulton Hospital Advisory Board.



STAN VINER

Stan is the President of SJViner & Associates. He has 35+ years of experience in the financial services industry. Prior to founding his company in 2017, he was the General Manager/Banking Sales at Jack Henry & Associates. Stan held this national role for over 15 years – after nearly 28 years, he retired from Jack Henry. Stan has a BBA from Ole Miss and a Managerial Leadership Certificate from the University of Texas/McCombs School of Business. He is a former instructor at the Graduate School of Banking at Colorado (Boulder) and past Board Member of InBank (Denver). Stan serves as a Strategist/Board Advisor for the William Mills Agency in Atlanta – one of the largest PR firms in the financial industry. He chairs the SRM/Europe International Advisory Board (London) and serves on the Advisory Board at Array, a NYC based Fintech. Additionally, Stan works with Fintechs across the country to fine-tune their branding, sales design, and overall go-to-market strategy.





CHARLES WHITE

Charles White is a Managing Director in the Fixed Income Capital Markets Division of Stifel Financial, a position held since 1998, having been a Senior Executive at Sterne Agee & Leach Inc., prior to its merger with Stifel in mid-2015. In banking since joining Citigroup in 1982, Charles has had just over 40 years in banking at Citi, 2 regional banks, and managing the bank-focused practice at a privately held investment banking firm, Sterne, Agee and Leach. He has experience as a bank director of just over 24 years, first at a National Bank, then at a State Bank with operations across the Southeastern US. A member of ALCO and Executive Committees of these boards, Charles has extensive experience in dealing with both the regulators and the risk management processes in both the OCC and FDIC environments. At Sterne Agee, he served as both Chairman of the Risk Management Committee and a member of the Board of Directors, as well as head of the Fixed Income Division and post-merger, served as Chairman of the Shareholder Advisory Group.

Charles is a Banking and Finance Graduate of Ole Miss in 1982, and a graduate in the same year of the New York Institute of Finance. He and Mary (Ole Miss BAE '83) have 3 children – all Ole Miss Graduates, three grandkids and one more on the way.



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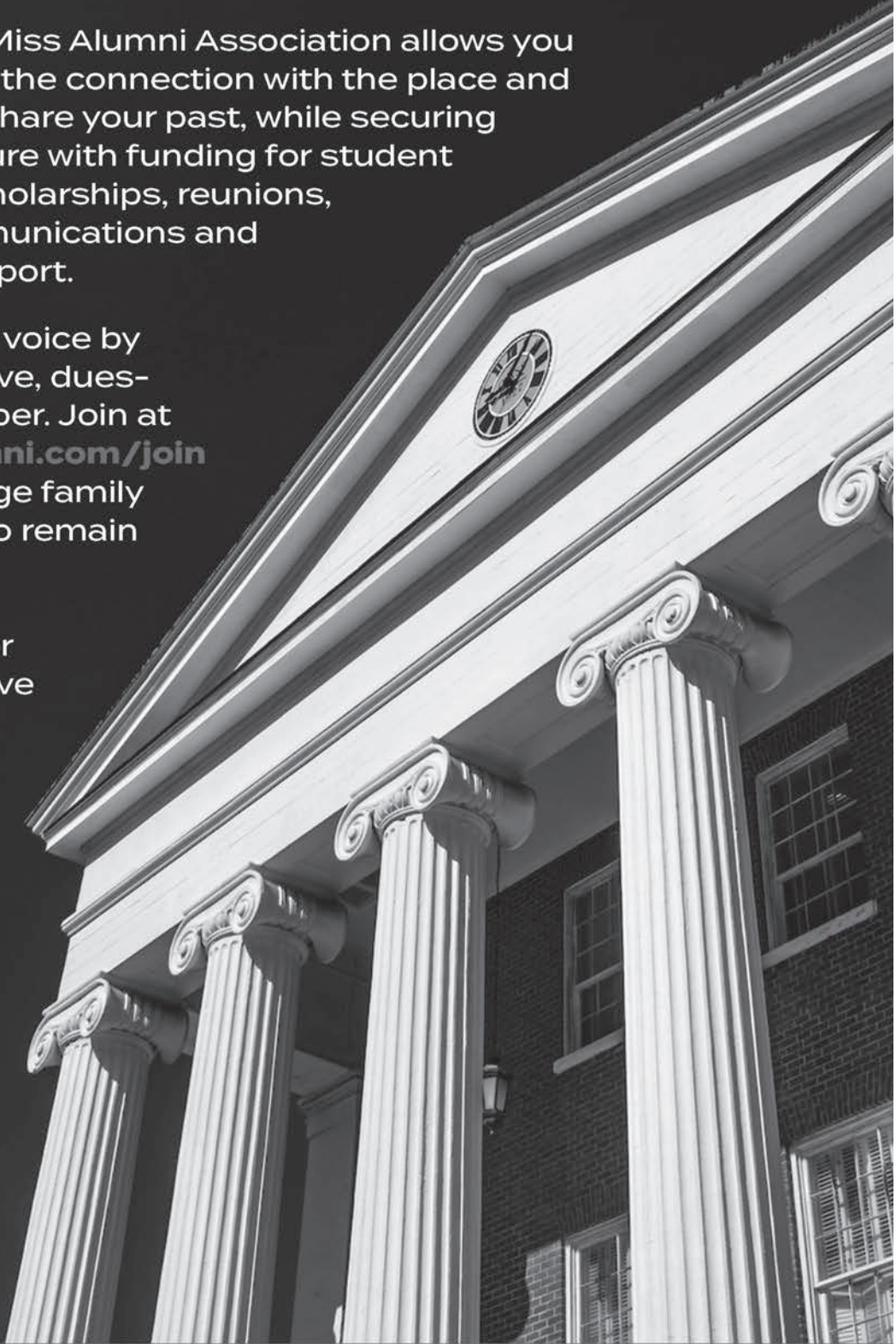
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2023 DISTINGUISHED FINANCE EXECUTIVE AWARD



MILTON RAY “HOPPY” COLE, JR.

*President & CEO
The First Bancshares, Inc. and The First Bank*

M. Ray “Hoppy” Cole, Jr., currently serves as President and CEO of The First Bancshares, Inc. and The First Bank — and serves as the Chairman of both Boards of Directors. Prior to joining the bank in September 2002, Hoppy was secretary/treasurer and chief financial officer of the Headrick Companies, Inc., for 11 years. He began his career with The First National Bank of Commerce in New Orleans, Louisiana and held the position of corporate banking officer from 1985-88. In December of 1988, Hoppy joined Sunburst Bank in Laurel, Miss., serving as senior lender and later as president of the Laurel office.

Cole graduated from the University of Mississippi where he earned a Bachelor’s and Master’s Degree in Business Administration. He is a past chairman of the Mississippi Bankers Association and the Area Development Partnership and currently serves on the executive committee of both organizations. Hoppy also serves on the board of Extra Table, a non-profit organization focused on eliminating hunger in Mississippi. He is a member of Venture Church. He and his wife, Cindy, have four sons and three granddaughters and currently reside in Ellisville, Mississippi.

PAST DISTINGUISHED FINANCE EXECUTIVE AWARD RECIPIENTS

2002	Aubrey B. Patterson
2003	J. Herbert Boydston
2004	Henry Paris
2005	Howard L. McMillan
2006	Hugh S. Potts, Jr.
2007	S. Griffin Norquist
2008	E. Robinson McGraw
2009	None
2010	None
2011	Dana Drago
2012	Archie McDonnell
2013	Shirley Crawford
2014	William Ray
2015	Ron Samuels
2016	Billy Gottshall
2017	Rod Taylor
2018	Thomas W. Colbert
2019	Charles White
2020	Symposium not held
2021	William N. Fry, IV
2022	Mitch Waycaster

The Distinguished Finance Executive Award is presented by the Banking and Finance Council and Frank R. Day/Mississippi Bankers Assoc. Chair of Banking at the University of Mississippi. The award honors finance executives who are leaders with noteworthy and impactful careers in the banking or finance industries. Past recipients include bank CEOs and investment banking executives from Mississippi and across the nation, all of whom are Ole Miss alumni. The award is meant to inspire generations of future Ole Miss Banking graduates to impactful careers in banking and finance, and to celebrate the success of these deserving individuals.

2023 EMERGING LEADER AWARD



CHARLIE CLARK

*President of Community Banking
Synovus*

Charlie Clark was named President of Community Banking in July 2023. Clark is responsible for advancing the community bank's geography-based delivery model. This includes the management of market-based leadership and commercial teams across the bank's five-state footprint as they continue to build and deepen relationships while delivering exceptional service to clients.

A 17-year Synovus team member, Clark joined the company as a management associate in 2006. Prior to being promoted to President of Community Banking, he served as a senior director in wholesales banking since 2019. His career trajectory includes roles as portfolio manager, credit analyst and corporate banker before stepping into a leadership position in 2014 as senior vice president and director, middle market banking.

Clark earned his bachelor's degree from the University of Mississippi in 2005 and currently serves on the board of directors for its Banking and Finance School. He also graduated from the ABA Stonier Graduate School of Banking and the Leadership Program at The Wharton School at the University of Pennsylvania. Furthermore, Clark serves as Chairman of the Board for PreSchool Partners, a non-profit providing school readiness and life skills for under-resourced communities.

Charlie resides in Birmingham with his wife Mary Coleman Clark, who is a self-employed architect. They have two children, Charles (6) and Kitty (3).

PAST EMERGING LEADER AWARD RECIPIENTS

2021

Mollie Seymour
Argent Trust

2022

Taylor McCutcheon
Regions

The Emerging Leader Award is presented by the Banking and Finance Council and Frank R. Day/Mississippi Bankers Association Chair of Banking at the University of Mississippi. The award acknowledges and celebrates Ole Miss Banking and Finance graduates who have demonstrated exemplary leadership, upward professional mobility and a commitment to the banking and finance industry.

2023 PIONEER AWARD

FRANK ROGERS DAY

Frank Rogers Day, a native of Aberdeen, Mississippi, is remembered for his strong leadership in business and exceptional generosity to his fellow man. He graduated from the University of Mississippi in 1953 and later from the Graduate School of Banking at Louisiana State University. After earning a degree from Ole Miss, he served as a 2nd Lieutenant in the U.S. Army in Augsburg, West Germany.

Mr. Day began his banking career in 1958 with the First National Bank of Jackson, Mississippi, the predecessor to Trustmark National Bank. He advanced steadily through the ranks of the bank. In 1976, he became President of First Capital Corp., the bank's holding company. Five years later in 1981, he was named Chairman of the Board and Chief Executive Officer of First National Bank.

The bank experienced extraordinary growth under Mr. Day's leadership. He oversaw the acquisition of 15 financial institutions across Mississippi making Trustmark the largest bank in the state. Assets increased five-fold from \$1.3 billion to \$6 billion, and earnings per share increased for 17 consecutive years. He presided over milestone events in the bank's history, including the name change to Trustmark National Bank in 1985 and its 100th anniversary in 1989.

Mr. Day had great affection for his alma mater, Ole Miss. He provided visionary leadership as President of the University of Mississippi Foundation and dynamic service on the university's Business Advisory Council. Ole Miss honored him by inducting him into its prestigious Alumni Hall of Fame in 1986.

In addition to his commitment to excellence in his own banking career, Mr. Day exemplified the life of a philanthropist. In 1978, he established the Luckyday Foundation with the primary focus of providing scholarships for Mississippians to attend universities in their home state and obtain college degrees. Since 2001, more than 5,700 Luckyday Scholars have received four years of scholarship funding as well as enrichment programming focused on student success, leadership development, and career readiness. Luckyday has a presence at all three of the state's major public universities.

The Christine and Clarence Day Scholarship in the University of Mississippi School of Business Administration was established by Mr. Day in memory of his parents. The largest business scholarship in the state, it is awarded each year to an outstanding high school senior.

The Luckyday Foundation joined with the Mississippi Bankers Association in 2001 to honor Mr. Day's legacy in banking by endowing the Frank R. Day/Mississippi Bankers Association Chair of Banking at the University of Mississippi. The oldest state association-sponsored chair of banking in the United States, this endowed faculty position has promoted banking through undergraduate instruction, continuing banker education, and consumer education. The endowment represented a major investment in the education of future bankers and ensured the permanence and stability of the chair.

Frank Day died on December 6, 1999. His tremendous legacy will continue to have a transformative impact on Mississippi students, their families, and their communities.

*This acknowledgement is to memorialize trailblazers in the banking industry.
We recognize and celebrate the lives and contributions of Ole Miss Banking and Finance Graduates
who demonstrated vision, leadership, and dedication to the banking and finance industry.*

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FINANCIER'S CLUB

The Financier's Club provides an opportunity for Finance students to use knowledge from the classroom to manage a real investment portfolio. Each semester, student volunteers manage a stock portfolio with a value of approximately \$500,000 dollars by designing long-term investment strategies, placing trades and preparing performance reports.

The students follow an industry and develop a buy, hold, or sell recommendation. The students meet weekly to discuss their current holdings and new stock picks. The members attend regional investment conferences to present their strategy and discuss the portfolio's performance with students at other universities.

The student club invites speakers to present on a range of topics that often include discussions of different career paths.

Faculty Advisors are Dr. Mark Walker (Associate Professor of Finance) and Dr. Scott O'Brien (Instructional Assistant Professor of Finance).

NOTES

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